



HMIS PATH

(Projects for Assistance in Transition from Homelessness)

Maine HMIS and ServicePoint 5

What is PATH?

- PATH = Projects for Assistance in Transition from Homelessness
- Federal Grant Program funded by the U.S. Department of Health & Human Services and Substance Abuse & Mental Health Services Administration
- Maine's PATH Program mandates utilization of HMIS by PATH Providers for all persons receiving both Outreach/Engagement Services and PATH Enrolled Services



U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
Substance Abuse and Mental Health Services Administration
www.samhsa.gov



*Department of Health
and Human Services*

*Maine People Living
Safe, Healthy and Productive Lives*

Why PATH?

Designed to support the outreach, engagement and delivery of services to eligible persons who are literally homeless and have a serious mental illness and/or co-occurring substance use disorder, with emphasis on:

- a. Persons most in need of services and/or engagement by an Outreach worker
- b. Services which are not supported by mainstream mental health programs

**Persons who meet the above criteria may be eligible for
PATH Enrollment**





PATH Entry, Engagement, Enrollment, and Exit in HMIS

State-Funded PATH Services & Referrals Provided

Work begins with Client on first Date of Contact. First Contact is recorded through the Entry on the CLS sub-assessment.

**Entry into
PATH**

Additional Client Contacts are made and recorded in Interim Reviews. A Contact is recorded for every interaction.

**Additional Points
of Contact
Recorded**

Client is Engaged in PATH when they agree to services. A Date of Engagement is recorded in an Interim Review.

**Date of
Engagement
Recorded**

Federal-Funded PATH Services & Referrals Provided

Client is Enrolled when they have been determined to be PATH Eligible.

**Date of
Enrollment
Recorded**

An Exit from PATH should be recorded when the Client transitions out of the Program.

**Exit from
PATH**

Data Collection Stages

Collection Phase: **Outreach**

- Contacts
 - Date
 - Location
- Minimum data that Provider can use to identify Client
 - Physical Description (Five Foot Tall Woman)
 - Specific Location (Man Under Bridge)
 - Clothing/Accessories (Girl Wearing Red Sox Hat)

Data Collection Stages

Collection Phase: **Engagement**

- Housing Status
- Name
- SSN
- Date of Birth
- Date of Engagement
- Mental Health Status
- Substance Abuse
- Maximum UDEs where possible
- Referrals/Services (State Funded)

Data Collection Stages

Collection Phase: **Enrollment**

- Date of PATH Status
- Full UDEs
- Common Data Elements
 - Income and Sources
 - Non-Cash Benefits
 - Health Insurance
 - Disabilities
- Referrals/Services (PATH Funded)

Enroll only Literally Homeless Applicants that meet one (1) or more of the below requirements, as determined by a Licensed Clinical Supervisor. All such determinations shall be made within six (6) months of the first Outreach:

- The Case Management Services for Member Experiencing Homelessness eligibility requirements, as stated in 10-144 C.M.R. ch. 101, ch. 2, § 13.03-5; and/or
- The Specific Requirements, as stated in 10-144 C.M.R. ch. 101, ch. 2, § 17.02-3; and
- Has formally consented to participate in Services provided by the PATH Program.

Data Collection Stages

Data Collection Phase: **Exit**

- Reason for Leaving
- Destination
- Housing Status
- Income and Sources
- Non-Cash Benefits
- Health Insurance
- Disabilities

PATH Definitions and Associated Data Entry Processes

Contact: Definition & Data Entry Process

- **Definition:** A contact is defined as an interaction between a worker and a Client designed to engage the Client. Contacts may include activities such as a conversation between the Street Outreach worker and the Client about the Client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.
- **Data Entry Process:** A contact must be recorded using the Current Living Situation sub-assessment anytime a Client is met, including when a Date of Engagement, Project Entry Date, or Date of PATH Status Determination/Enrollment is recorded on the same day.
 - Record Date of Contact - contacts should be recorded all the way through to Exit

Engagement – Definition & Data Entry Process

- **Definition:** The Date of Engagement is the date on which an interactive Client relationship results in a deliberate Client assessment or the beginning of a case plan.
- **Data Entry Process:** The Date of Engagement should be entered into HMIS at the time in which the Client has been engaged by the Street Outreach worker.
 - This date may be on or after the Project Entry Date and must be prior to the Date of Enrollment and the Project Exit Date
 - If the Client exits without becoming engaged, the Date of Engagement should be left blank

Enrollment

Enroll only Literally Homeless Applicants that meet one (1) or more of the below requirements, as determined by a Licensed Clinical Supervisor. All such determinations shall be made within six (6) months of the first Outreach:

- **The Case Management Services for Member Experiencing Homelessness eligibility requirements, as stated in 10-144 C.M.R. ch. 101, ch. 2, § 13.03-5; and/or**
- **The Specific Requirements, as stated in 10-144 C.M.R. ch. 101, ch. 2, § 17.02-3; and**
- **Has formally consented to participate in Services provided by the PATH Program.**

The worker should enroll a Client in PATH if the following has occurred:

- The worker determined the Client to be PATH eligible (homeless or at imminent risk of homelessness and seriously mentally ill)
- The worker recorded at least one Contact with the Client (this could be the contact at Project Entry)
- The worker has established a Date of Engagement with the Client (the date is either on or after the Project Start Date)
- The worker has opened an individual file on the Client and the Client has agreed to PATH Enrollment

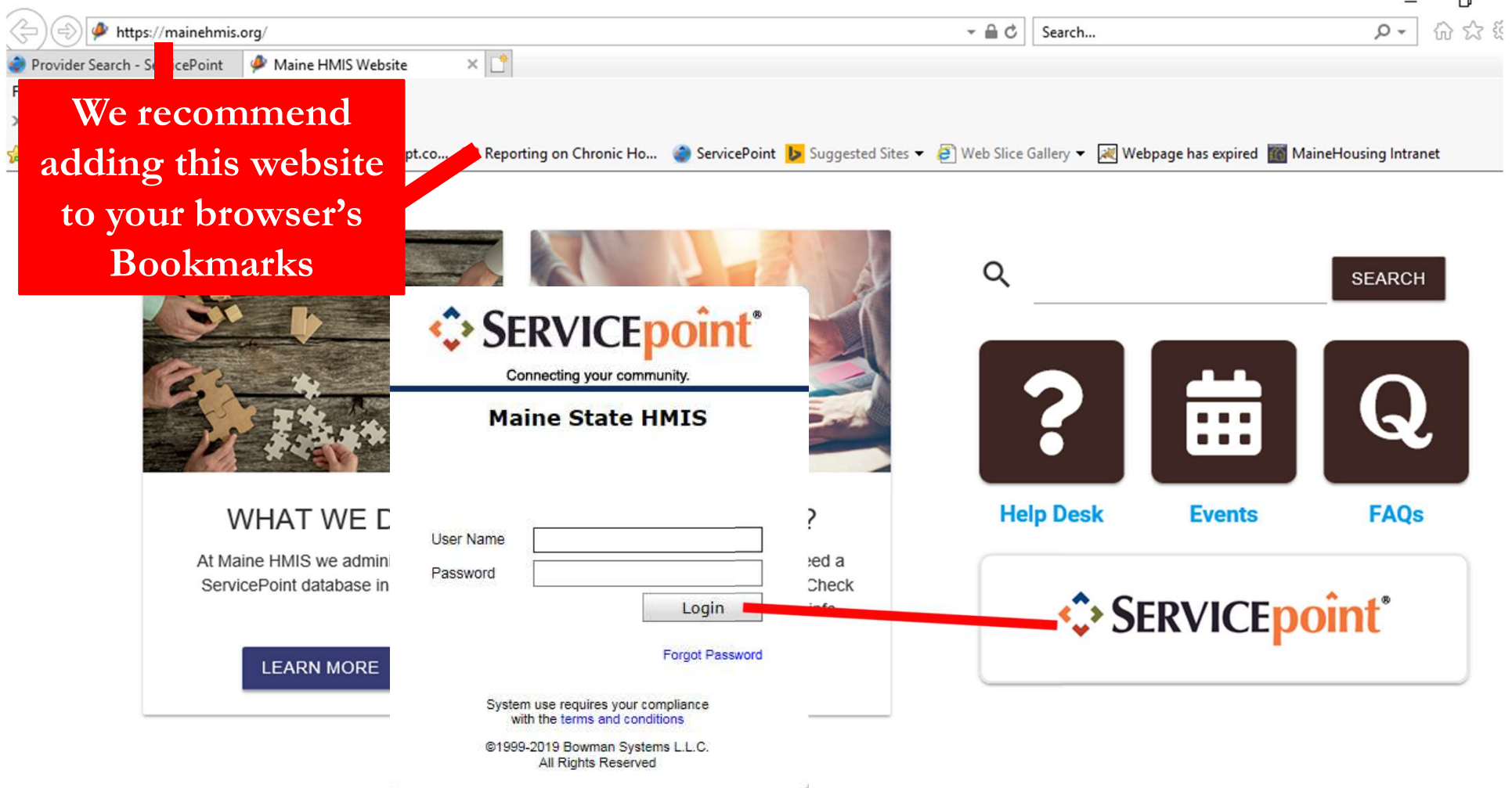
Enrollment & Date of PATH Status Determination

- If the Client has been determined eligible and consented to participate in services provided by the PATH project, the “Client Became Enrolled in PATH” data element needs to be answered ‘Yes’ and the appropriate Enrollment Date should be recorded in the Date of PATH Status Determination field found in the Interim assessment.
- If a Client is not enrolled in PATH, the “Client Became in Enrolled in PATH” data element is answered ‘No’ and the reason should be recorded in the corresponding field. A Project Exit should then be added to the Client’s record for that same date.

PATH Data Entry in HMIS

Getting Started:

Visit <https://MaineHMIS.org>



We recommend adding this website to your browser's Bookmarks

The screenshot shows a web browser window with the URL <https://mainehmis.org/>. The browser's address bar and tabs are visible. The website content includes the Servicepoint logo with the tagline "Connecting your community." and the heading "Maine State HMIS". Below this is a login section with fields for "User Name" and "Password", a "Login" button, and a link for "Forgot Password". To the right of the login section is a search bar and three large buttons labeled "Help Desk", "Events", and "FAQs". At the bottom of the page, there is a footer with the text "System use requires your compliance with the [terms and conditions](#)" and "©1999-2019 Bowman Systems L.L.C. All Rights Reserved". A red callout box with the text "We recommend adding this website to your browser's Bookmarks" has two red arrows pointing to the browser's address bar and the Servicepoint logo.

Servicepoint®
Connecting your community.

Maine State HMIS

WHAT WE DO
At Maine HMIS we administer the ServicePoint database in

LEARN MORE

User Name
Password
Login
[Forgot Password](#)

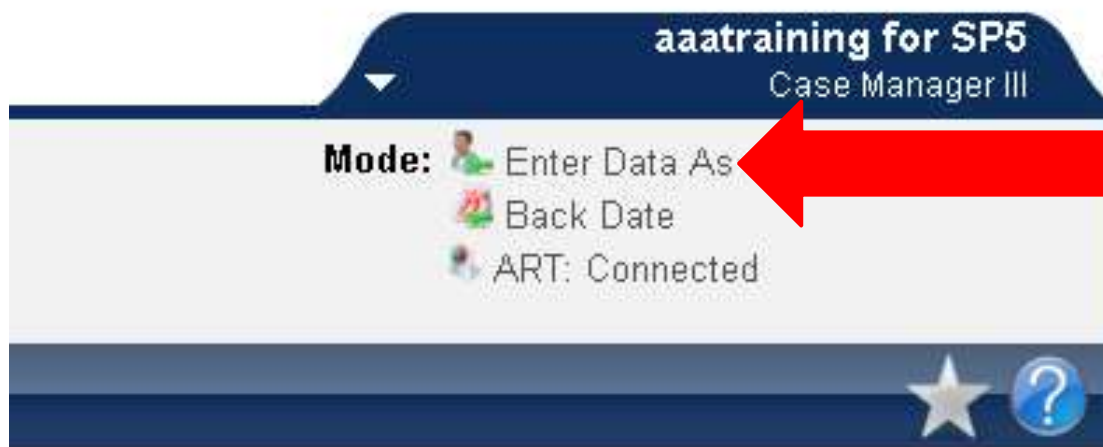
System use requires your compliance with the [terms and conditions](#)
©1999-2019 Bowman Systems L.L.C.
All Rights Reserved

SEARCH

Help Desk Events FAQs

Servicepoint®

Choose the Project (EDA) You Will Be Inputting Data Entry For



The first thing you must do after logging into ServicePoint is click on the “Enter Data As” mode (located in the top right corner) and choose the project you are going to do data entry for.

Enter Data As (EDA)

There are two EDA's (projects) for each Provider:

- {Provider Name} PATH
 - Use this EDA for Street Outreach Clients

- {Provider Name} PATH Services Only
 - Use this EDA for Clients that are housed or in shelter

Project (EDA) Selection

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A			
	Provider																										Level	Phone	Location	Last Updated
+	AA_Training_Always_Share (765)																										Level 3	Unknown	Augusta, ME 04330	09/24/2012
+	AA_Training_CallPoint_Call_Center (772)																										Level 3	Unknown	Unknown	01/18/2013
+	AA_Training_ClientPoint_Shelter (530)																										Level 3	Unknown	Augusta, ME 04330	08/20/2013
+	AA_Training Day Program (616)																										Level 3	Unknown	Augusta, ME 04330	06/15/2012
+	AA_Training Home to Stay Program (842)																										Level 3	Unknown	Augusta, ME 04330	08/30/2013
+	AA_Training HP_RP Financial Assistance (520)																										Level 3	Unknown	Augusta, ME 04330	08/21/2011
+	AA_Training HP_RP Services (519)																										Level 3	Unknown	Augusta, ME 04330	08/21/2011
+	AA_Training_Never_Share (766)																										Level 3	Unknown	Augusta, ME 04330	07/26/2012
+	AA_Training PATH (521)																										Level 3	Unknown	Augusta, ME 04330	03/06/2013
+	AA_Training_PIT_Unsheltered (839)																										Level 3	Unknown	Unknown	02/13/2013
+	AA_Training_PSH (605)																										Level 3	Unknown	Augusta, ME 04330	07/26/2012

aaatraining for SP5
Case Manager III

Mode:

or Global Search

• Choose the project you are going to do data entry for from the dialog by clicking on the green “+” next to that project.

• For PATH, you will choose the project “{Provider Name} PATH” or “{Provider Name} PATH Services Only”

How Do I Determine which EDA to use?

Ask the Client “Where did you stay last night?”

- If the Client responds with an answer consistent with a place **not meant** for human habitation, enter the Client into the Street Outreach project.
- If the Client responds with an answer consistent with a place **meant** for human habitation (including emergency shelters), enter the Client into the PATH Services Only project.
- If the Client does not provide an answer, wait until you can get an answer, then enter the Client into HMIS at that point.
- If the Client does not provide an answer and you never encounter the Client again, you should enter them into the PATH Services Only project. This will keep the Client from being counted in the HUD System Performance Measure 7A.

Select the ClientPoint Module



Maine State HMIS

AAA_Training Provider

September 10, 2013

 [Home](#) > Home Page Dashboard

▶ Last Viewed Favorites

[Home](#)

[ClientPoint](#)

▶ [CallPoint](#)

[ResourcePoint](#)

[ShelterPoint](#)

[ActivityPoint](#)

[SkanPoint](#)

▶ [Reports](#)


▶ [Admin](#)

[Logout](#)

System News (5)		Agency News (0)
Date	Headline	
08/13/2013	Thursday 8/15, the system will be unavailable beginning at 10pm that night	
04/22/2013	Need Help? Something not working?	
03/30/2013	Get MaineHMIS news by email!	
01/19/2013	FYI- ART reporting data is not updated on weekends	
01/03/2013	SECURITY REMINDER, It is a violation of your user agreement and of the confidentiality rules of the Maine HMIS system to allow anyone to access ServicePoint and/or enter data into ServicePoint under your ID and password.	
		View All

Searching for and Adding Clients

Client Search

 Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
	<input type="text" value="t-"/>			

Add New Client With This Information

Client Number

Enter or scan Client ID number to go directly to that Client's profile.

Client ID #

Submit

Search for existing
Clients or add new
Clients

Client Search Results

Client Search

Note: Please Search the System before adding a New Client.


	First	Middle	Last	Suffix
Name	<input type="text" value="Clark"/>	<input type="text"/>	<input type="text" value="Kent"/>	<input type="text"/>
Alias	<input type="text"/>			
Social Security Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Client Results


	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned
	59982	Kent, Clark	000-00-0000	09/27/1951	Superman	Male	

Showing 1-1 of 1

Search for the Client. If found, click on the pencil icon to select the Client.

Add Data from the Client Search Screen

Client Search

 Please Search the System before adding a New Client.

Name	<input type="text"/>
Name Data Quality	-Select-
Alias	<input type="text"/>
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>
Social Security Number Data Quality	-Select-
U.S. Military Veteran?	-Select-
Exact Match	<input type="checkbox"/>

Search

Clear

Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Submit

Search for the Client. If not found, fill in the full name, SSN, and Veteran information. Click “Add New Client With This Information”.

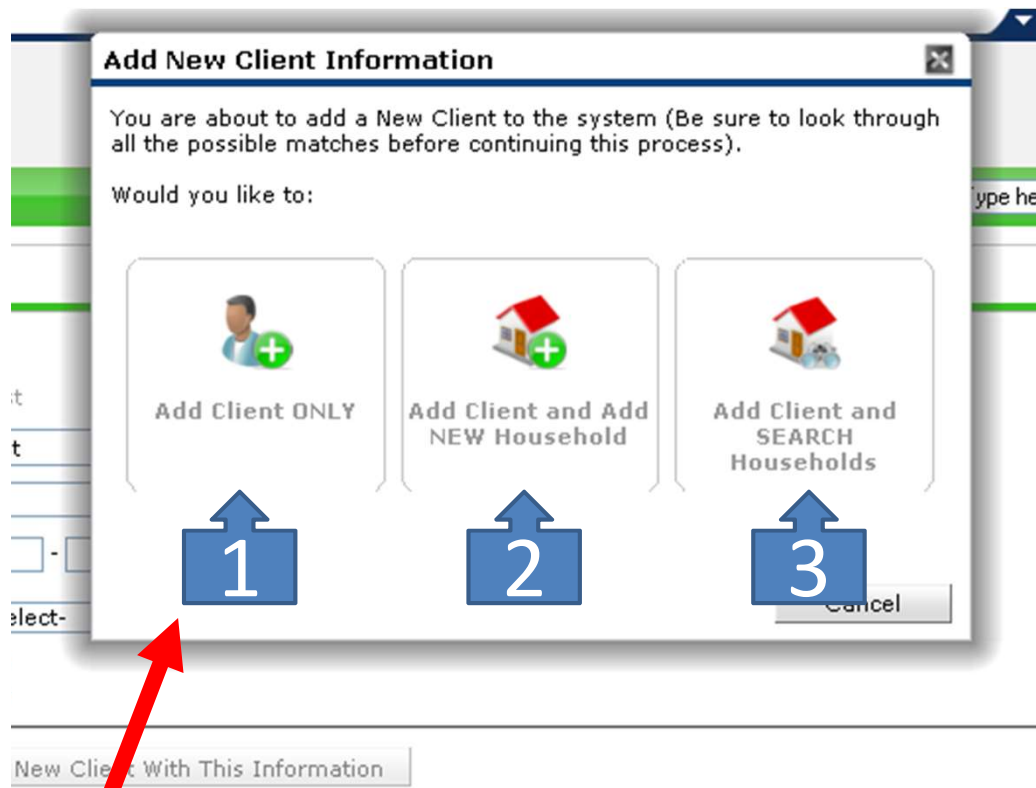


Add New Client Information

This overlay screen offers three options:

- 1 – Add a single individual only
- 2 – Add an individual, create a household, and add other household members
- 3 – Create a new individual record and add it to an existing Household.




The Maine PATH program does not record household information – select option 1.



Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:

 Add Client ONLY 1	 Add Client and Add NEW Household 2	 Add Client and SEARCH Households 3
--	---	---

Cancel

New Client With This Information

Maine PATH & Households



The Maine PATH program does not record household information.

Only single adults should be entered into the PATH or PATH Services Only EDAs.

If a Client is part of an existing household, be sure the Entry does not include any of those household members.

The Workflow Begins from the Client Summary Screen

Last Viewed
Favorites

Home
ClientPoint
ResourcePoint
SkanPoint
Reports
Admin
Logout

Client - (121565) bridge, man under

(121565) bridge, man under
Release of Information: None

Client Information

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Added to the system 06/18/2019 02:10 PM

Name

bridge, man under

Gender


Date of Birth

Primary Race

Social Security

Secondary Race

U.S. Military Veteran?



Entry/Exits

Program	Type	Project Start Date	Exit Date
<div>Add Entry / Exit</div> <div>No matches.</div>			

Services

Start Date	End Date	Provider
<div>Add Service</div> <div>Add Multiple Services</div> <div>No matches.</div>		

Outstanding Outgoing Referrals

Referral Date	Referred To Provider	Need Type
<div>Add Referral</div> <div>No matches.</div>		


Exit

ServicePoint Tabs

Client - (81780) Bird, Tweety

(81780) Bird, Tweety

Release of Information: **None**

-Switch to Another Household Member- 

Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers


Case Plans

Activities

Assessments

Added to the system 09/18/2013 09:14 AM


Name	Bird, Tweety	Gender	
Date of Birth		Primary Race	
Social Security	555-55-5555	Secondary Race	



Client Profile Tab

Client Information**Service Transactions**

Summary **Client Profile** **Households** **ROI** **Entry / Exit** **Case Managers** **Case Plans** **Activ**

 **Client Record** **Issue ID Card**

Name	Mermaid, Ariel the
Name Data Quality	
Alias	
Social Security	--5555
SSN Data Quality	Approximate or partial SSN reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	51

The Client Profile tab is where you edit the Client Record – Name, SSN and Veteran information only.

Add Entry Exit

- Entry/Exit's are the core of ServicePoint.
- The Program Type, Entry Date and Exit Date define the Client's relationship to programs, services, and all other actions which ServicePoint allows us to record.
- Until the Client has the dates of Entry/Exit's recorded, consider the Client "On Hold" (waiting to be connected, but not there yet).
- For PATH, the Entry Date will be the date you first have contact with a Client. Exit dates are added when the Client is no longer in the program.





Add Entry /
Exit

Add an Entry

- Click “Add Entry/Exit”
- Select PATH from the ‘Type’ drop-down box
- Change the Project Start Date, if needed

Project Start Data - (103797) McBoatface, Boaty

Provider *	AA_Training PATH (521)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Type *	PATH ▼			
Project Start Date *	02 / 12 / 2018   8 : 51 : 46 AM			

Entry Data Elements

- Record answers to questions, as outlined in the data collection phases.
- All UDE's should be entered into HMIS on or before the Date of Engagement
(except for 3.11 – Project Exit Date and 3.12 – Destination)
- Data Quality is measured after the Date of Engagement.

UDE Collection Timeline

Universal Data Elements	At Project Start	By Date of Engagement	At Date of Enrollment	At Project Exit
3.01 Name	X			
3.02 Social Security Number		X		
3.03 Date of Birth		X		
3.04 Race		X		
3.05 Ethnicity		X		
3.06 Gender		X		
3.07 Veteran Status		X		
3.08 Disabling Condition		X		
3.10 Project Start Date	X			
3.11 Project Exit Date				X
3.12 Destination				X
3.15 Relationship to Head of Household	X	X	X	X
3.16 Client Location	X	X	X	X
3.917 Living Situation	X	X	X	X

Per the State PATH Program: If you aren't able to obtain the Client's name at 1st Outreach, input minimum data a Provider can use to identify Client, such as a physical description, specific location, or clothing/accessories description.



Common Data Elements Collection Timeline

Common Program Specific Data Elements	At Project start	By Date of Engagement	At Date of Enrollment	At Project Exit
4.02 Income and Sources		X		
4.03 Non-Cash Benefits		X		
4.04 Health Insurance		X		
4.05 Physical Disability		X		
4.06 Developmental Disability		X		
4.07 Chronic Health Condition		X		
4.08 HIV/AIDS		X		
4.09 Mental Health Problem		X		
4.10 Substance Abuse		X		
4.11 Domestic Violence		X		
4.12 Current Living Situation	X	X	X	X
4.13 Date of Engagement		X		

Current Living Situation: Records **Contact** with the Client. A **Contact** must be recorded on the Current Living Situation sub-assessment for every time you talk to, meet with, or **provide a Service on behalf of** a Client.



Federal Partner Program Data Elements Collection Timeline

Federal Partner Program Data Elements	At Project start	By Date of Engagement	At Date of Enrollment	At Project Exit
P1 Services Provided - PATH Funded			X	X
P2 Referrals Provided - PATH			X	X
P3 PATH Status			X	
P4 Connection with SOAR	X	X	X	X

P1 – PATH Funded Services Provided: Record the Date and Type of each Service provided, as they occur

P2 – PATH Funded Referrals Provided: Record the Date, Type & Outcome of each Referral made, as they occur

P3 – PATH Status: Enter Date of PATH Status Determination and answer whether Client Became Enrolled in PATH. If not Enrolled, why not? Collection should be **at or before** the Exit Date.

P4 – Connection with SOAR: Yes/No question. To be answered at all Collection Points.



PATH Status Determination & SOAR

PATH Status Determination: Only one PATH status date and response is allowed for each project stay. If a client exits and returns to the project later, the previously entered enrollment data does not apply and a new response must be entered based on this new project start and project exit service period.

Connection to SOAR: SOAR is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults who are experiencing or at-risk of experiencing homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder.



HHS PATH Entry for Street Outreach Assessment

Entry Assessment

Select an Assessment

☒ Maine Required Data Elements




















☒ HHS PATH Annual Assessment (2020)


☒ HHS PATH Entry for SO (2020)


Household Members

☒ (116412) testy, test
Age: Unknown
Veteran: No (HUD)

HHS PATH Entry for SO (2020) Entry Date: 10/03/2019 08:09:42 AM

Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Date of Birth Type	<input type="text" value="Full DOB Reported (HUD)"/> 
Primary Race	<input type="text" value="-Select-"/> 
Secondary Race	<input type="text" value="-Select-"/> 
Ethnicity	<input type="text" value="-Select-"/> 
Gender	<input type="text" value="-Select-"/> 
Does the client have a disabling condition?	<input type="text" value="-Select-"/> 
Relationship to Head of Household	<input type="text" value="-Select-"/> 
Client Location	<input type="text" value="-Select-"/> 
Prior Living Situation	<input type="text" value="-Select-"/> 
Length of Stay in Previous Place	<input type="text" value="-Select-"/> 
Approximate date homelessness started:	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today	<input type="text" value="-Select-"/> 
Total number of months homeless on the street, in ES or SH in the past three years	<input type="text" value="-Select-"/> 
Income from Any Source	<input type="text" value="-Select-"/> 

 **Monthly Income**

HUD Verification 

HHS PATH Entry for Services Only Assessment

Entry Assessment

Select an Assessment

☒ Maine Required Data Elements
 ☒ HHS PATH Annual Assessment (2020)
 ☒ **HHS PATH Entry for SSO (2020)**

Household Members

☒ (116412) testy, test
 Age: Unknown
 Veteran: No (HUD)

HHS PATH Entry for SSO (2020) Entry Date: 10/03/2019 08:11:19 AM

Date of Birth: / /

Date of Birth Type: **Full DOB Reported (HUD)**

Primary Race: **-Select-**

Secondary Race: **-Select-**

Ethnicity: **-Select-**

Gender: **-Select-**

Does the client have a disabling condition?: **-Select-**

Relationship to Head of Household: **-Select-**

Client Location: **-Select-**

Prior Living Situation: **-Select-**

Length of Stay in Previous Place: **-Select-**

Income from Any Source: **-Select-**

Monthly Income HUD Verification

Start Date*	Source of Income	Receiving Income Source?	Monthly Amount	End Date
<div>Add View Gross Income</div>				
Total Monthly Income: <input type="text"/>				
Non-cash benefit from any source: -Select-				

Non-Cash Benefits HUD Verification

Start Date*	Source of Non-Cash Benefit	Receiving Benefit?	End Date
<div>Add</div>			
Covered by Health Insurance: -Select-			

HHS PATH Entry Assessments

- Contains all the UDE's
- Answer as many as possible before Date of Engagement
- Should have the majority of the UDE's answered prior to the Enrollment Date

Maine Required Data Elements Assessment













- Data outside the HUD UDE's that needs to be collected.
- Includes Release of Information, Zip Code of Last Permanent Address, and a VI-SPDAT.

PATH Entry:

First Contact Added at Entry

- The first Contact is recorded under the **Current Living Situation** sub-assessment found under the Entry Assessment
- **Date of First Contact** must match the **Project Start Date**

Add Recordset - (116412) testy, test

Current Living Situation	
Start Date *	10 / 23 / 2019    G
End Date	/ /    G
Information Date	/ /    G
Current Living Situation	-Select-  G
If "Other", Specify	<input type="text"/> G
Living situation verified by	-Select-  G
Is client going to have to leave their current living situation within 14 days?	-Select-  G

Common Data Elements

Income from Any Source
-Select-
G

Monthly Income
HUD Verification

Start Date *	Source of Income	Receiving Income Source?	Monthly Amount	End Date
Add View Gross Income				

Total Monthly Income
G

Non-cash benefit from any source
-Select-
G

Non-Cash Benefits
HUD Verification

Start Date *	Source of Non-Cash Benefit	Receiving Benefit?	End Date
Add			

Covered by Health Insurance
-Select-
G

Health Insurance
HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
Add			

Health, Substance Abuse, and Disabilities
HUD Verification

Start Date *	Disability Type	Disability determination	End Date(A)
Add			

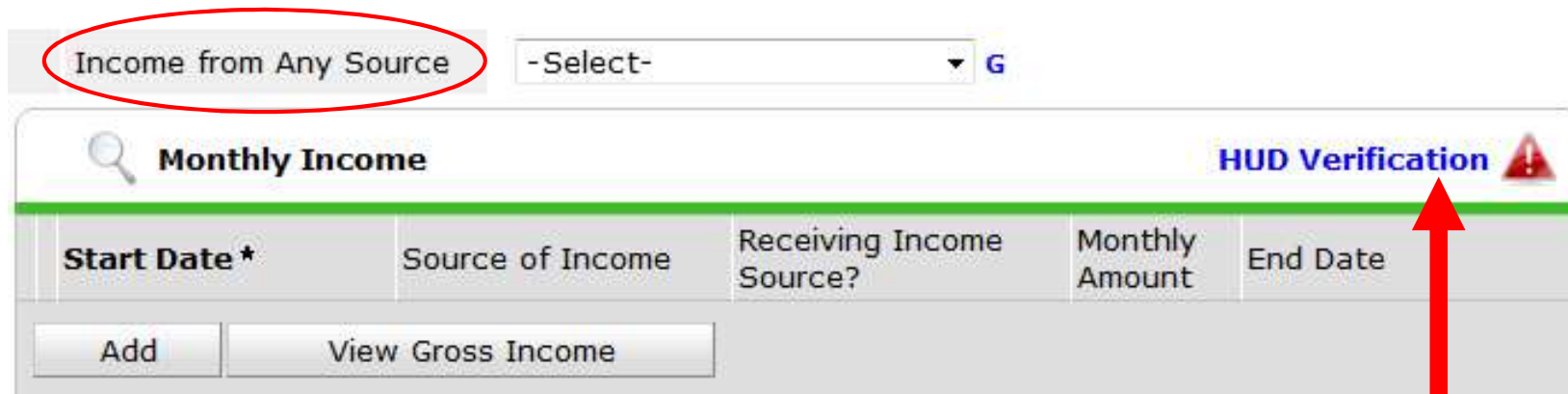
Domestic violence victim/survivor
-Select-
G

If yes for Domestic violence victim/survivor, when experience occurred
-Select-
G

If yes for Domestic Violence Victim/Survivor, are you currently fleeing?
-Select-
G

Recording Common Data Elements

- If the Client has an income from any source, select 'Yes' from the drop-down.




The screenshot shows a web interface for recording data. At the top, there is a label 'Income from Any Source' circled in red, followed by a dropdown menu currently set to '- Select -' and a small blue 'G' icon. Below this is a section titled 'Monthly Income' with a magnifying glass icon on the left and a 'HUD Verification' button with a red warning triangle icon on the right. A red arrow points from the 'HUD Verification' button down to the text in the next list item. Below the title bar is a table with five columns: 'Start Date *', 'Source of Income', 'Receiving Income Source?', 'Monthly Amount', and 'End Date'. At the bottom of the table are two buttons: 'Add' and 'View Gross Income'.

Start Date *	Source of Income	Receiving Income Source?	Monthly Amount	End Date
<div>Add View Gross Income</div>				

- Click 'HUD Verification' and an overlay screen will appear.

HUD Verification Overlay

HUD Verification: Monthly Income for 10/15/2014

 Per Source of Income, the current records for Monthly Income as of 10/15/2014 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 10/15/2014, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

- ☐ [No](#)
☐ [Data Not Collected](#)
☒ [Incomplete](#)

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save







Save & Exit

Exit

Add Recordset

Add Recordset

Monthly Income

Start Date *	10 / 15 / 2014    G
Source of Income	Unemployment Insurance (HUD)
Receiving Income Source?	Yes
Monthly Amount	350.00 G
End Date	/ /    G
If Other, Please Specify	<div>G</div>

Complete End Date to update when the client is no longer receiving this income source â

SaveCancel

Interim Reviews & Additional Contacts

Documenting Updates

- Navigate to the Entry/Exit Tab and click on the **Interims** icon.
- Any changes to Common Data Elements after the Project Start Date are made through an **Interim**.

Client - (100918) Buchanan, Daisy

(100918) Buchanan, Daisy

Release of Information: **None**




-Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Measurements Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit


Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
AA_Training PATH (521)	PATH	12/01/2015				

Add Entry / Exit


Showing 1-1 of 1

Exit

Add Interim Review

Interim Reviews 

Interim Reviews Associated with this Entry / Exit

	Review Date	Review Type	Client Count
	No matches.		

Exit

Interim Review Type and Date

Add Interim Review - (115389) Client, Test, Jr

Interim Review Data	
Entry / Exit Provider	AA_Training PATH (521)
Entry / Exit Type	PATH
Interim Review Type *	Update
Review Date *	06 / 20 / 2019 10 : 50 : 22 AM

Interim Review Type = Update
Review Date = Date of Outreach

Save & Continue

Cancel

Using Interim Review to Add Engagement Date and PATH Status Determination

Date of Engagement	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
Date of PATH Status Determination	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
Client Became Enrolled in PATH	-Select-  G
If no, reason not enrolled	-Select-  G
Connection with SOAR	-Select-  G

- Interim Reviews should also be used to add the Date of Engagement and PATH Status Determination (regardless of Enrollment or non-enrollment).
- Interim Review type is 'Update'
- Review Date should correspond to Engagement Date or PATH Status Determination Date




Documenting Additional Outreach Contacts

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
AA_Training PATH (521)	PATH	12/01/2015				

Add Entry / Exit

Showing 1-1 of 1

As you make contact with Clients, navigate to the Entry/Exit Tab and select 'Add an Interim' to complete the **Current Living Situation** sub-assessment found on the **HHS PATH Update (2020)** assessment.

Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
Add			

Interim Assessments

- Use the sub-assessments found in the **HHS PATH Update (2020)** assessment to record changes to the Common Data Elements. Only update what has changed.
- Never delete a source; always input an End Date.
- Notice the HUD Verification has a green check mark next to it. This confirms that all fields were answered.

HHS PATH Update (2020)
Interim Review Date: 10/29/2019 11:39:39 AM

Client Location
-Select-
G

Income from Any Source
-Select-
G

Monthly Income
HUD Verification

Start Date *	Source of Income	Receiving Income Source?	Monthly Amount	End Date
Add View Gross Income				

Total Monthly Income
G

Non-cash benefit from any source
-Select-
G

Non-Cash Benefits
HUD Verification

Start Date *	Source of Non-Cash Benefit	Receiving Benefit?	End Date
Add			

Covered by Health Insurance
-Select-
G

Health Insurance
HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
Add			

Health, Substance Abuse, and Disabilities
HUD Verification

Start Date *	Disability Type	Disability	End Date (A)
--------------	-----------------	------------	--------------

Services & Referrals

Services & Referrals

PATH Clients who are not Enrolled are not eligible to receive Federal PATH Funded Services and Assisted Referrals; therefore, the only Services & Referrals that should be recorded prior to Enrollment are State-funded PATH Services and Referrals.

PATH Manual Language:

“The HMIS data element **P1 Services Provided – PATH Funded** is used to determine the PATH-funded services that are provided to a Client during/after Enrollment and prior to Project Exit.”

“The HMIS data element **P2 Referrals Provided – PATH** is used to determine the referrals that are provided to a Client during Enrollment. A referral has been attained once the PATH-Enrolled Client begins receiving Services as the result of PATH assistance.

Service List

Number of Services *	<input type="text" value="1"/>
Start Date *	<input type="text" value="06"/> / <input type="text" value="14"/> / <input type="text" value="2019"/> <input type="button" value="23"/> <input type="button" value="24"/> <input type="button" value="25"/> <input type="text" value="3"/> : <input type="text" value="12"/> : <input type="text" value="50"/> PM <input type="button" value="v"/>
End Date	<input type="text" value="06"/> / <input type="text" value="14"/> / <input type="text" value="2019"/> <input type="button" value="23"/> <input type="button" value="24"/> <input type="button" value="25"/> <input type="text" value="3"/> : <input type="text" value="12"/> : <input type="text" value="50"/> PM <input type="button" value="v"/>
Service Type *	-Select- <input type="button" value="v"/>
Type of PATH FUNDED Service Provided	-Select- <input type="button" value="v"/>

Services and Referrals: What's the Difference?



VS.



- A Service is assistance provided by the PATH Provider
- A Referral is made to another Agency or Provider for additional Services

PATH Services

Client Information

Service Transactions

Summary
Client Profile
Households
ROI

Entry / Exit
Case Managers
Case Plans
Assessments

Added to the system 06/18/2019 02:10 PM

Name

bridge, man under

Date of Birth

01/20/1973 (Age 46)

Social Security

Gender


Male

Primary Race





White (HUD)

Secondary Race

U.S. Military Veteran?



Entry/Exits

Program	Type		Project Start Date		Exit Date
CHCS - PATH Services Only	PATH		06/18/2019		06/18/2019
CHCS - PATH	PATH		06/17/2019		

Add Entry / Exit
Showing 1-2 of 2

Services

Start Date	End Date	Provider
Add Service	Add Multiple Services	No matches.

Add / Update Services

PATH Services Before Enrollment

▼ Household Members

This Client is not a member of any Households.

Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

→ **Service Provider ***

CHCS - PATH Services Only (1050) ▼

Service List

Number of Services *

1

→ **Start Date ***

06 / 20 / 2019    2 ▼ : 41 ▼ : 28 ▼ PM ▼

End Date

06 / 20 / 2019    2 ▼ : 41 ▼ : 28 ▼ PM ▼

→ **Service Type ***





-Select-

Type of PATH FUNDED Service Provided

-Select-

Do not enter a PATH Funded Service Type if Service is provided before Enrollment

PATH Services

Service List	
Number of Services *	<input type="text" value="1"/>
Start Date *	08 / 05 / 2015   2 : 49 : 29 PM
End Date	08 / 05 / 2015   2 : 49 : 29 PM
Service Type *	-Select-
Type of PATH FUNDED Service Provided	-Select-
Need Information	
Need Status *	
Outcome of Need	
If Need is Not Met, Reason	
	<ul style="list-style-type: none"> Basic Income Maintenance Programs (NL-1000) Case/Care Management (PH-1000) Educational Support Services (HL) Employment (ND) Family Maintenance/Reunification (PH-6500.1500-200) Health Care Referrals (LH-2600) Homeless Employment Programs (NR-6500.3050) Housing Counseling (BH-3700) Housing Search Assistance (BH-3900.3100) Job Search/Placement (ND-3500.3600) Job Training Formats (ND-2000.3500) Medicaid Applications (NL-5000.5000-520) Medicare Enrollment (NS-8000.5000-560) Mental Health and Substance Abuse Services (R) Mental Health Evaluation (RP-5000) Mental Health Support Services (RR) Parenting Education (PH-6100) Rehabilitation/Habilitation Services (LR) Social Security Disability Insurance Applications (NS-1800.8000-820)

PATH Services After Enrollment

▼ Household Members

This Client is not a member of any Households.

Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

→ **Service Provider ***

CHCS - PATH Services Only (1050) ▼

Service List

Number of Services *

1

→ **Start Date ***

06 / 20 / 2019



2 ▼

: 41 ▼

: 28 ▼

PM ▼

End Date

06 / 20 / 2019



2 ▼

: 41 ▼

: 28 ▼

PM ▼

→ **Service Type ***







-Select-

→ **Type of PATH FUNDED Service Provided**

-Select- ▼

Remember to record both a Service Type and a PATH Funded Service Type if service is provided after Enrollment

PATH Services

Service List	
Number of Services *	<input type="text" value="1"/>
Start Date *	08 / 05 / 2015    2 ▾ : 49 ▾ : 29 ▾ PM ▾
End Date	08 / 05 / 2015    2 ▾ : 49 ▾ : 29 ▾ PM ▾
Service Type *	- Select- ▾
Type of PATH FUNDED Service Provided	- Select- ▾
Need Information	<div> <div> Need Status * </div> <div> Outcome of Need If Need is Not Met, Reason </div> </div> <div> Outreach Screening/assessment Habitation/rehabilitation Community Mental Health Substance Use Treatment Case management Residential support service Housing minor renovation Housing moving assistance Housing technical assistance Security deposits One-time for eviction prevention Other PATH funded services </div>

PATH Services

Multiple Services

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider * AA_Training PATH (521)

Service List

Number of Services *

Start Date * 11 / 19 / 2013 10 : 51 : 16 AM

End Date 11 / 19 / 2013 10 : 51 : 16 AM

Service Type * -Select-

Need Information

Need Status * Identified

Outcome of Need -Select-

If Need is Not Met, Reason -Select-


Clicking “Add Another”
will prompt a new
Service section to
appear so that
additional Services can
be recorded.


Creating Referrals


Client Information


Service Transactions


Service Transaction Dashboard



Add Need



Add Service


Add Multiple Services


Add Referrals


View Previous Service Transactions


View Shelter Stays


View Entire Service History

Referral Provider

Referral Provider Quicklist

Provider -Select- Add Provider Bed Availability

Selected Provider

Provider	Phone	Location	Last Updated







Refer to Provider


- Select-
- Select-
- Community Mental Health (PATH Referral) (Z) (916)
- Educational Services (PATH Referral) (Z) (920)
- Employment Assistance (PATH Referral) (Z) (925)
- Housing Placement Assistance (PATH Referral) (Z) (922)
- Income Assistance (PATH Referral) (Z) (924)
- Job Training (PATH Referral) (Z) (919)
- Medical Assistance (PATH Referral) (Z) (923)
- Primary Health Services (PATH Referral) (Z) (918)
- Relevant Housing Services (PATH Referral) (Z) (921)
- Substance Use Treatment (PATH Referral) (Z) (917)

Select 'Referral Provider' from the drop-down list.

Referral Data

Referral Data

Needs Referral Date *	01 / 13 / 2015   
Referral Ranking	- Select- ▼
Type of PATH Referral	- Select- ▼
If any "Type of PATH Referral" made, select Outcome	- Select- ▼
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	AA_Training PATH (521) - Select- ▼

 ☐ [Check to notify ServicePoint Providers by Email.](#)

Update:

- Referral Date
- Type of PATH Referral
- Outcome of Referral

Referral Type

Referrals			Send Summary
Referred-To Provider	Basic Income Maintenance Programs	Referred Clients	
Community Mental Health (PATH Referral) (Z) (916)	<input checked="" type="checkbox"/>	(93523) Cat, Garfield	

Be sure to check the box indicating the Referral Type

Save Needs ONLY	Save ALL	Clear ALL	Cancel
-----------------	----------	-----------	--------

Click 'Save All'

Adding an Exit

Exiting Clients



- Clients who no longer receive PATH Services or Outreach should be Exited from the Program in HMIS (*60 days without Service or Contact would apply here*).
- If a Client is not enrolled for any reason, once PATH Status Determination information is recorded, an Exit from the Program should be added to the Client Record.

Creating the Exit Record

Client - (121565) bridge, man under


(121565) bridge, man under
Release of Information: None




Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Added to the system 06/18/2019 02:10 PM

Name	bridge, man under	Gender	Male
Date of Birth	01/20/1973 (Age 46)	Primary Race	White (HUD)
Social Security		Secondary Race	
		U.S. Military Veteran?	



Entry/Exits			
Program	Type	Project Start Date	Exit Date
CHCS - PATH Services Only	PATH	 06/18/2019	 06/18/2019
CHCS - PATH	PATH	 06/17/2019	

Add Entry / Exit Showing 1-2 of 2

Services		
Start Date	End Date	Provider
<input type="button" value="Add Service"/> <input type="button" value="Add Multiple Services"/>		
No matches.		

Outstanding Outgoing Referrals




Referral Date	Referred To Provider	Need Type
<input type="button" value="Add Referral"/>		
No matches.		

Click the pencil icon under 'Exit Date' for the corresponding Project Start Date



Creating the Exit Record

Edit Exit Data - (121564) Stuart, Mary

Edit Exit Data - (121564) Stuart, Mary	
Exit Date*	<div> <div>06</div> <div>/</div> <div>14</div> <div>/</div> <div>2019</div> <div>    </div> <div>3</div> <div>▼</div> <div>:</div> <div>20</div> <div>▼</div> <div>:</div> <div>42</div> <div>▼</div> <div>PM</div> <div>▼</div> </div>
Reason for Leaving	<div>-Select- ▼</div>
If "Other", Specify	<div></div>
Destination*	<div>-Select- ▼</div>
If "Other", Specify	<div></div>
Notes	<div></div>

HHS PATH Exit (2020) Assessment

Entry Assessment

Exit Assessment

Select an Assessment

☒ Maine Required Data Elements
 ☒ HHS PATH Annual Assessment (2020)
 ☒ **HHS PATH Exit (2020)**

Household Members

☒ (116412) testy, test
Age: Unknown
Veteran: No (HUD)

HHS PATH Exit (2020)

Exit Date: 10/03/2019 08:21:48 AM

Income from Any Source

-Select-

G

Monthly Income

HUD Verification

Start Date*	Source of Income	Receiving Income Source?	Monthly Amount	End Date
<div>Add</div> <div>View Gross Income</div>				

Total Monthly Income

G

Non-cash benefit from any source

-Select-

G

Non-Cash Benefits

HUD Verification

Start Date*	Source of Non-Cash Benefit	Receiving Benefit?	End Date
<div>Add</div>			

Covered by Health Insurance

-Select-

G

Health Insurance

HUD Verification

Start Date*	Health Insurance Type	Covered?	End Date
<div>Add</div>			

Health, Substance Abuse, and Disabilities

HUD Verification

Start Date*	Disability Type	Disability determination	End Date(A)
<div>Add</div>			

Current Living Situation

Start Date*	End Date	Information Date	Current Living Situation
-------------	----------	------------------	--------------------------